



Building a Workforce Planning Team

Your Workforce Planning Team is the core group who will design, implement and evaluate your agency's WFP process. Using a team approach improves the quality, applicability and understanding of assumptions, data, options and decisions.

The role and responsibilities of the WFP Project Team are to:

- Design the WFP Implementation and Evaluation Plan.
- Ensure implementation of the WFP process.
- Evaluate the WFP process and make appropriate changes.

You can use the templates on the next seven pages to help you put your Workforce Planning team together.

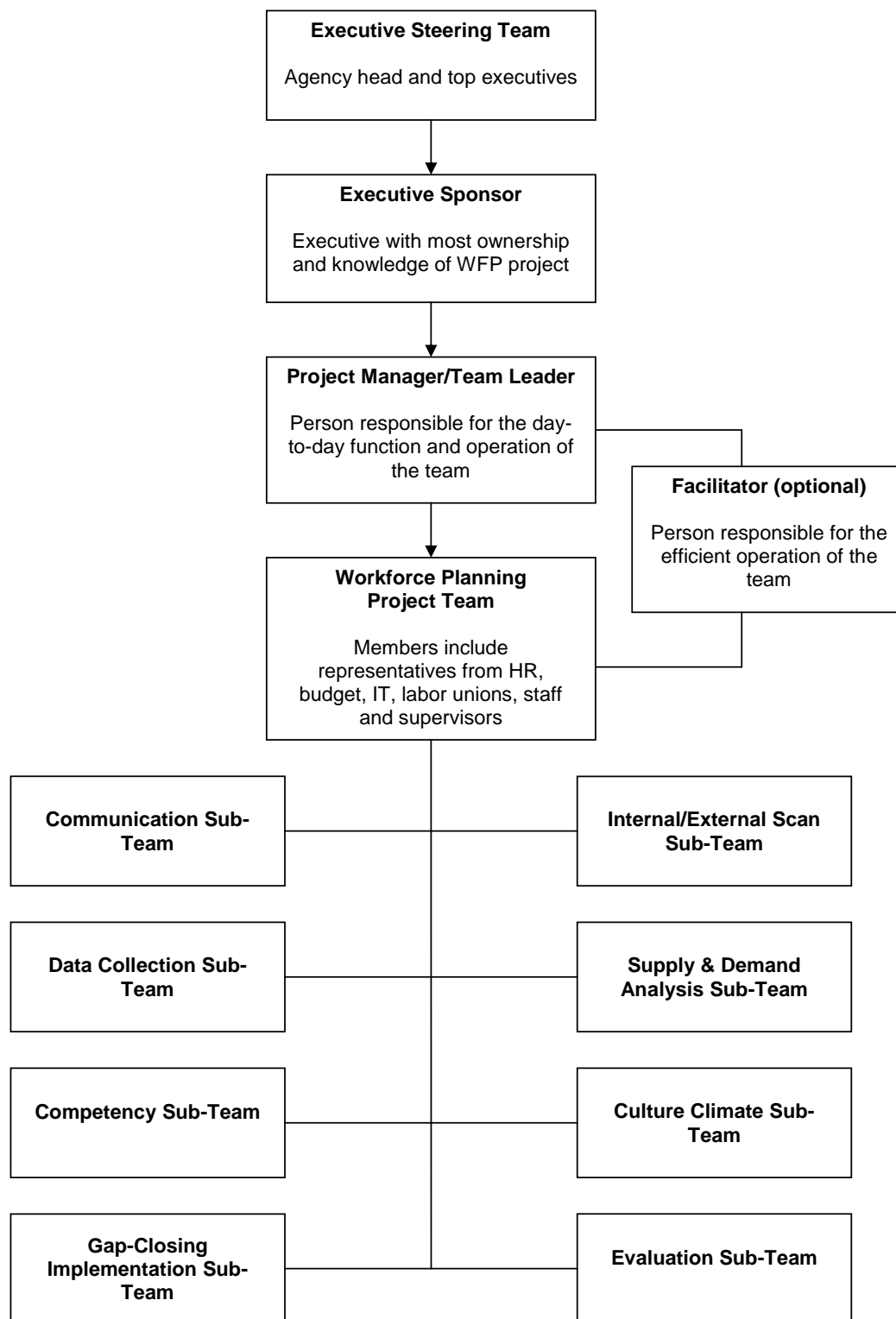
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Organization Chart Guidelines

- The Executive Steering Team is an oversight team made of the highest level of leaders in your agency. It primarily provides direction and resources.
- The Workforce Planning Project Team is the major working team. It's comprised of the mid-level managers for IT, HR and Budget, as well as a representative cross-section of supervisors and staff (e.g. union representative, HR staff). This team is charged with collecting all of the information and preparing a final WFP report to be reviewed and acted on by the Executive Steering Team.
- The third level includes the Sub-Teams – these are working groups, probably with overlapping members, where the actual work of implementing your WFP gets done. The number and membership of these teams is flexible. Each Sub-Team should:
 - Have one or more members of the Workforce Planning Project Team.
 - Be led by a Workforce Planning Project Team member.
 - Include non-Workforce Planning Project Team staff as needed, such as data experts, software experts and financial staff.
 - Workforce Planning Team members could serve on one or more sub-teams, as could non-Workforce Planning Team staff.
 - In a small agency, there may not be any sub-teams and everything would be done by the Workforce Planning Project Team.



Workforce Planning Team Organization Chart





Guidelines for Building your Workforce Planning Team

- It is important to ensure commitment from top management and leadership to lead the Workforce Planning process, ensure alignment with strategic directions, and hold managers accountable for carrying out Workforce Planning and using the results.
- Top managers can gain support by sharing their vision of the future organization and articulating how WFP will benefit the organization and individual employees.
- It is equally important to get buy-in from program managers who have much to gain from the benefits of WFP. Engage program managers by asking them to lead the WFP in their program areas.
- Line managers and employees who are involved in developing and implementing the strategic Workforce Planning process not only buy in, but also are in a position to promote the program with other line managers and employees.

Checklist for Building your Workforce Planning Team

My Workforce Planning Team/s include:

- ☒ A diverse mix of management and employees that represent various organizational levels, functional areas and locations.
- ☒ Line managers who oversee areas with critical hiring needs and/or retirement vulnerability will be involved in this Workforce Planning cycle.
- ☒ Line staff including both recent hires and those employees with more experience.
- ☒ Gender and racial mix.
- ☒ Multi-generational mix.
- ☒ Dedicated and knowledgeable staff – use the approach of the “best and the brightest” to select team members.
- ☒ Those with specific expertise needed to implement WFP – HR, IT, Finance.
- ☒ Union representatives, as appropriate.



Workforce Planning Team Matrix

Team Member	Who This Is	Team Role/Responsibilities	Why Include Them
Executive Sponsor	A high-ranking manager – it may be a department director, team leader, or human resources manager. This person has the authority to make decisions and understands operations.	<ul style="list-style-type: none"> ▪ The individual with the most ownership of the project. ▪ Oversee creation and completion of the WFP. ▪ Has the ability to obtain resources to accomplish the project. ▪ Provide guidance and direction for the WFP effort. ▪ Communicate progress internally and externally. ▪ Ensure the linkage between strategic plans and workforce plans. ▪ Include HR in strategic WFP. 	<ul style="list-style-type: none"> ▪ Create a link to top management and outside stakeholders. ▪ Provide clear communication. ▪ Smoothly integrate the WFP with the agency's strategic initiatives.
WFP Project Manager	Ideally, a manager with skills in communication, organization development, project management, and use of software tools.	<ul style="list-style-type: none"> ▪ Ensure coordination among WFP initiatives. ▪ Provide standardized guidelines and training for WFP participants and for line managers and employees in Workforce Planning and related HR topics. ▪ Provide a mechanism for coordinating and collaborating with all units, facilitating the gathering of and sharing of innovative practices. ▪ Manage accountability for the WFP progress. ▪ Lead the effort to maintain and update the plan. ▪ Lead the communication strategy. ▪ Prepare and provide/present/share reports. 	<ul style="list-style-type: none"> ▪ Provides Project Management Skills ▪ Assists Executive Sponsor

Team Member	Who This Is	Team Role/Responsibilities	Why Include Them
Top Leaders – Executive Steering Team	Agency Head and Director-level and above: Operations; Program; HR; IT; Finance	<ul style="list-style-type: none"> Identify the desired WFP change, the reasons for it, the expected benefits, and the impact the change may have on employees. Maintain commitment to the WFP and communicate that commitment. Provide leadership attention to accountability for implementing the WFP. Establish priorities for resource allocation for human capital efforts. Develop Goals and Performance Measures for WFP Provide the necessary resources and allow time for the changes to occur, but hold staff accountable for performance. 	<ul style="list-style-type: none"> Recognize the need for Workforce Planning. Demonstrate commitment to WFP. Provide the resources to make WFP happen. Provide the vision of the future direction of the organization.
Workforce Planning Project Team	Line Managers, staff from HR, IT, Finance/Budget; Union Reps; employees	<ul style="list-style-type: none"> Develop and participate on sub-teams for the various Workforce Planning steps. Receive reports from sub-teams and incorporate information into overall workforce plan. Provide periodic reports on status of Workforce Planning to Executive Sponsor and Executive Steering Team. Manage the overall Workforce Planning project for the agency Prepare status reports as needed Conduct an annual evaluation of the workforce plan Conduct lessons-learned focus group and provide a written report on lessons learned 	This cross-departmental team including staff and management will ensure the buy-in of the agency for Workforce Planning and integrate the WFP needs into the strategic planning process.
Line Managers	Line Managers and frontline supervisors	<ul style="list-style-type: none"> Work with HR to gather data, identify gaps that exist in the current workforce when compared to future requirements, determine priorities in key areas, and offer creative strategies for action plans. Participate in the development of WFP plans/initiatives. Integrate WFP initiatives into unit business plans. Implement the action plans in own operational area. Demonstrate commitment, support and leadership, and allocate local resources. 	<ul style="list-style-type: none"> Provide a valuable source of organizational information. Provide them with ownership of WFP. Line Managers will use WFP to align HR actions (recruitment, training) with strategic goals and objectives. Identify key competencies. Responsible for implementing the WFP action plans in their operational areas.

Team Member	Who This Is	Team Role/Responsibilities	Why Include Them
Employees	Employees involved in the specific positions affected by Workforce Planning	<ul style="list-style-type: none"> Provide feedback and share information and knowledge. Be involved in developing proposed solutions in the unit. 	Employees are a valuable source of information about the work – the duties and responsibilities and the competencies required to do the work.
HR	Director of HR may serve on the Workforce Planning project team and HR staff may serve on sub-teams	<ul style="list-style-type: none"> Participate in the development of the WFP and unit-specific initiatives. Provide necessary workforce data. Work with line managers as partners to identify needs, competencies and gaps that exist in the current workforce when compared to future requirements. Assist in developing strategies, solutions and alternatives to address the issues. Provide human resources policy development expertise. Provide advice on techniques and strategies for addressing workforce challenges, and other specialized support. Provide input for issues related to recruiting and retaining racial and ethnic minorities, women and persons with disabilities, and related diversity issues. 	<ul style="list-style-type: none"> HR can become more informed about the agency's core business and strategic initiatives. HR drives the data collection process, providing demographic data, retirement projections and turnover information. HR often follows up with the departments on the completion of their workforce plans. HR will be involved at the agency level in the development of the overall WFP.
IT	IT Manager	<ul style="list-style-type: none"> Provide information on current Workforce Planning data available; whether it's automated, etc. Help automate the collection and reporting of Workforce Planning data. 	Will provide programming needed to extract employee information from the HRIS or payroll system.

Team Member	Who This Is	Team Role/Responsibilities	Why Include Them
Budget	Budget Manager	<ul style="list-style-type: none"> Provide budget information including the number of positions allocated. Identify possible funding sources for WFP process costs. 	<ul style="list-style-type: none"> Ensure the linkage between the budget and WFP. Provide a source of knowledge on budget information including funding sources and the number of positions allocated. Workforce plans provide a sound basis for justifying budget and staffing requests, since there is/will be a clearer connection between objectives and the budget and human resources needed to accomplish them.
Union	Elected Union representatives	<ul style="list-style-type: none"> Participate with agency management to identify and resolve issues related to action strategy implementation through collaborative efforts and/or collective bargaining. May serve on the Workforce Planning Project Team 	Informing union representatives early in the WFP process of the intent and expected results of the WFP will smooth discussions regarding implementation of gap-closing strategies.



Workforce Planning Teams – Roles and Responsibilities

Team Name	Team Members	Roles and Responsibilities
Executive Steering Team	<ul style="list-style-type: none"> Head of Agency Director Level and above Executive Sponsor Workforce Planning Manager 	<ul style="list-style-type: none"> Provide Guidance and direction for the WFP effort Ensure linkage between strategic plan and WFP Ensure resources are available for planning and committee work
Workforce Planning Project Team	<ul style="list-style-type: none"> Line Managers HR, IT, Budget analysts/staff WFP Project Manager 	<ul style="list-style-type: none"> Develop sub-teams Receive sub-team reports and incorporate into WFP Provide updates on the status of Workforce Planning to the Executive Sponsor
Communications Sub-Team	<ul style="list-style-type: none"> WFP Project Manager Executive Sponsor 	<ul style="list-style-type: none"> Develop communication plan for agency
Internal/External Scan Sub-Team	<ul style="list-style-type: none"> HR IT Budget analysts 	<ul style="list-style-type: none"> Conduct an external scan of workforce issues Conduct an internal scan of workforce demographics, current skills, competencies and labor relations issues and organizational climate Turnover statistics Budget implications of workforce issues
SWOT Sub-Team	<ul style="list-style-type: none"> HR WFP Project Manager Employees Union reps Frontline Managers/Supervisors 	<ul style="list-style-type: none"> Determine agencies Strengths, Weaknesses, Opportunities and Threats through focus groups, online surveys
Supply and Demand Sub-Team	<ul style="list-style-type: none"> HR Frontline Managers 	<ul style="list-style-type: none"> Determine current workforce supply Determine workforce demand for the future Determine staffing resources available Determine gap between supply and demand
Competency Sub-Team	<ul style="list-style-type: none"> HR Frontline Managers Top Leaders Frontline employees 	<ul style="list-style-type: none"> Determine competencies for future needs for critical positions in the agency

Team Name	Team Members	Roles and Responsibilities
Culture Climate Sub-Team	<ul style="list-style-type: none"> ▪ HR ▪ Line Managers ▪ Executive Sponsor 	<ul style="list-style-type: none"> ▪ Develop an employee attitude survey for the agency ▪ Conduct focus groups to determine questions for the survey and issues
Gap-Closing Implementation Sub-Team	<ul style="list-style-type: none"> ▪ HR Director ▪ HR Staff ▪ Executive Sponsor ▪ WFP Project Manager ▪ Front managers 	<ul style="list-style-type: none"> ▪ Develop competency model for the agency ▪ Implement competency-based recruitment and selection, performance management and training and development ▪ Re engineering of work to meet strategic objectives
Evaluation Sub-Team	<ul style="list-style-type: none"> ▪ Executive Steering Team ▪ Executive Sponsor ▪ WFP Project Manager ▪ Support staff 	<ul style="list-style-type: none"> ▪ Develop project outcomes and measure success against plan